VistA

Update _2_0_20

Clinical Reminder Dialogs

Breast Cancer:
VA-Oncology Breast
VA-Oncology Breast MDC
VA-Oncology Breast Treatment Plan
VA-Oncology Treatment Summary

Colorectal Cancer:
VA-Oncology Colorectal
VA-Oncology Colorectal MDC
VA-Oncology Colorectal Treatment Plan
VA-Oncology Colorectal Treatment Summary

Lung Cancer:
VA-Oncology Lung
VA-Oncology Thoracic MDC
VA-Oncology Lung Treatment Plan
VA-Oncology Lung Treatment Summary

Prostate Cancer:
VA-Oncology Prostate
VA-Oncology Prostate MDC
VA-Oncology Prostate Treatment Plan
VA-Oncology Prostate Treatment Summary

Install Guide
March 2017

Product Development
Office of Information Technology
Department of Veterans Affairs

Table of Contents

Introduction

The purpose of this guide is to provide the Clinical Applications Coordinator/Health Informatics Specialist (CAC/HIS) with direction on the installation/implementation of the VA-Oncology reminder dialogs. These reminder dialogs were developed and are supported by the National Oncology Program Office in Specialty Care Services (part of Patient Care Services). Please contact Susan Hamilton-Hill for any questions/concerns at susan.hamilton-hill@va.gov.

The National Oncology Program Office seeks to provide tools to VA facilities to enable providers to format essential clinical data so that it is readily available for clinical care and to measure the quality of care in the VA in a prospective, timely, and cost-efficient manner. Using Reminder Dialogs in CPRS is one mechanism to support these goals. Reminder dialogs will include information necessary for quality assessment as defined by the National Quality Forum, ASCO's Quality Oncology Practice Initiative, and other reliable and up-to-date sources. Reminder dialogs will enable the standardization of clinical information necessary for quality indicators into a discrete format and obtain key elements to continuously monitor the quality of cancer care.

This installation guide is separated by cancer type (breast, lung, prostate, colorectal) that should help CAC/HIMs install in organized manner. Each cancer-type has 4 reminder dialogs that need to be installed (treatment plan, treatment summary, MDC, and stand-alone).

NOTE
If your facility does not provide oncology services, you are not required to install or use these reminder dialog templates

Reminder Dialogs

14 new reminder dialogs were created and updates to 2 oncology reminder dialogs (VA-Oncology Lung, VA-Oncology Prostate) are being distributed with this update. The VA-Oncology Lung and Prostate reminder dialogs were released with PXRM*2*0*38 in January 2015. The updates to these reminder dialogs were mainly to add new FDA approved medications and clinical content based upon user feedback.
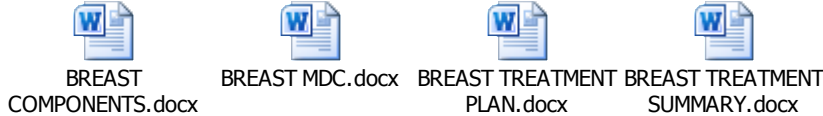
Breast Cancer
VA-Oncology Breast
VA-Oncology Breast MDC
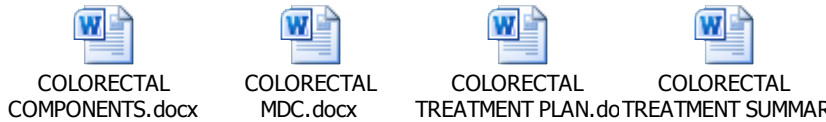**VA-Oncology Breast Treatment Plan**
VA-Oncology Breast Treatment Summary

Click on the embedded document to see contents of exchange file.

BREAST
COMPONENTS.docx BREAST MDC.docx BREAST TREATMENT BREAST TREATMENT
PLAN.docx SUMMARY.docx

Colorectal Cancer:

VA-Oncology Colorectal
VA-Oncology Colorectal MDC
VA-Oncology Colorectal Treatment Plan
VA-Oncology Colorectal Treatment Summary

Click on the embedded document to see contents of exchange file.

COLORECTAL
COMPONENTS.docx COLORECTAL
MDC.docx COLORECTAL
TREATMENT PLAN.do COLORECTAL
TREATMENT SUMMAF

Lung Cancer:

VA-Oncology Lung (update)
VA-Oncology Thoracic MDC
VA-Oncology Lung Treatment Plan
VA-Oncology Lung Treatment Summary

Click on the embedded document to see contents of exchange file.

LUNG
COMPONENTS.docx LUNG MDC.docx LUNG TREATMENT
PLAN.docx LUNG TREATMENT
SUMMARY.docx
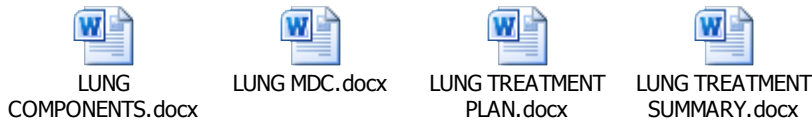
Prostate Cancer:

VA-Oncology Prostate (update)
VA-Oncology Prostate MDC
VA-Oncology Prostate Treatment Plan
VA-Oncology Prostate Treatment Summary

Click on the embedded document to see contents of exchange file.

PROSTATE
COMPONENTS.docx PROSTATE
MDC.docx PROSTATE
TREATMENT PLAN.do PROSTATE
TREATMENT SUMMAF
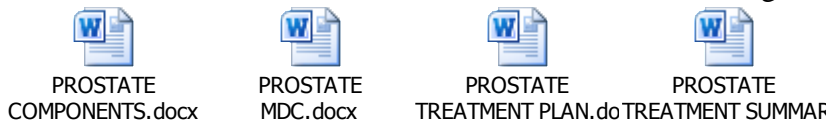
Install Details

This update is being distributed as a web host file. The address for the host file is:
http://vista.med.va.gov/reminders/UPDATE_2_0_20.PRD

The file will be installed using Reminder Exchange, programmer access is not required.

Installation:
=============
This update can be loaded with users on the system. Installation will take approximately 1.5 hours per exchange entry. Since there are 4 exchange entries, the total time will be approximately 6 hours. These can be installed using separate installs as we know you may not have 6 hours of straight time to perform the installs
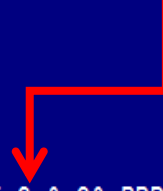
Install Example
To Load the Web Host File. Navigate to Reminder exchange in Vista

```
Item  Entry                        Source                   Date Packed
   1  691 PALLIATIVE CONSULT       AUSTIN@WEST LA VAMC      03/09/2011@10:42
      VERSION 3.0 (3/9/11)
   2  AJM IMMUNIZATION SERIES      MONTGOMERY@BEDFORD VAMC  03/22/2011@10:57
   3  AJM PN FOR BECKY             MONTGOMERY@BEDFORD VAMC  04/13/2011@19:09
   4  AJM PN FOR BECKY             MONTGOMERY@BEDFORD VAMC  04/14/2011@09:49
   5  AJM PXNAT TEST               MONTGOMERY@BEDFORD VAMC  04/11/2011@15:56
   6  BOINUR NHCU ADL REMINDER     MOORE@BOISE VAMC         03/13/2007@14:41
   7  DEP/PTSD POS FOLLOW TEST     MONTGOMERY@SALT LAKE CI  02/24/2017@10:45
   8  DEPRESSION/PTSD REMINDER TERM VOLPP@NORTHERN CAL      02/26/2010@12:07
      UPDATES - PATCH 17
+          + Next Screen   - Prev Screen   ?? More Actions             >>>
CFE   Create Exchange File Entry      LHF   Load Host File
CHF   Create Host File                LMM   Load MailMan Message
CMM   Create MailMan Message          LR    List Reminder Definitions
DFE   Delete Exchange File Entry      LWH   Load Web Host File
IFE   Install Exchange File Entry     RI    Reminder Definition Inquiry
IH    Installation History
Select Action: Next Screen// LWH   Load Web Host File
Input the url for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_20.PRD
```

At the **Select Action:** prompt, enter **LWH** for Load Web Host File
At the **Input the url for the .prd file:** prompt, type or copy/paste the following web address:
http://vista.med.va.gov/reminders/UPDATE_2_0_20.PRD

```
http://vista.med.va.gov/reminders/UPDATE_2_0_20.PRD successfully loaded.
```

You should see a message at the top of your screen that the file successfully loaded.

Note: This will install 4 new reminder exchange entries.
UPDATE_2_0_20 BREAST CANCER DIALOGS
UPDATE_2_0_20 LUNG CANCER DIALOGS
UPDATE_2_0_20 PROSTATE CANCER DIALOGS
UPDATE_2_0_20 COLON CANCER DIALOGS

Search and locate each entry name in reminder exchange

```
+Item   Entry                        Source                 Date Packed
    68  UPDATE_2_0_20 BREAST CANCER  HAMILTON-HIL@SALT LAKE  02/06/2017@12:19
        DIALOGS                      CI
    69  UPDATE_2_0_20 COLON CANCER   HAMILTON-HIL@SALT LAKE  02/07/2017@09:19
        DIALOGS                      CI
    70  UPDATE_2_0_20 LUNG CANCER    HAMILTON-HIL@SALT LAKE  02/06/2017@12:23
        DIALOGS                      CI
    71  UPDATE_2_0_20 PROSTATE CANCER HAMILTON-HIL@SALT LAKE 02/06/2017@12:27
        DIALOGS                      CI
    72  UPDATE_2_0_24 MISC UPDATE 3  GRIFFITH@SALT LAKE CI   02/14/2017@11:54
    73  UPDATE_2_0_4 VA-VETERANS     GRIFFITH@SALT LAKE CI   12/07/2015@06:03
+          + Next Screen   - Prev Screen   ?? More Actions                >>>
CFE  Create Exchange File Entry        LHF  Load Host File
CHF  Create Host File                  LMM  Load MailMan Message
CMM  Create MailMan Message            LR   List Reminder Definitions
DFE  Delete Exchange File Entry        LWH  Load Web Host File
IFE  Install Exchange File Entry       RI   Reminder Definition Inquiry
IH   Installation History
Select Action: Next Screen// IF   Install Exchange File Entry
Enter a list or range of numbers (1-186): 68
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Site will have to choose the 4 Item numbers that are associated with the correct exchange files installed. Choose the first Item number and use the IA option. The example below will use the Breast Cancer Dialog (*Item 68 in the account the screenshot was taken*). You will follow same process with the rest of the dialogs

Note: Each Cancer type (exchange file) install will take approximately 1.5 hours to complete.

```
      Component                                    Category    Exists
Source:      HAMILTON-HILL,SUSAN at SALT LAKE CITY
Date Packed: 02/06/2017@12:19:32
Package Version: 2.0P62

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-ONCOLOGY BREAST CANCER
  VA-ONCOLOGY TREATMENT SUMMARY BREAST
  VA-ONCOLOGY MDC BREAST
  VA-ONCOLOGY TREATMENT PLAN BREAST
Non-exchangeable TIU object(s):
------------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAME^TIULO(DFN)


+           Enter ?? for more actions                                >>>
IA   Install all Components           IS    Install Selected Component
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.

During the install, when you are prompted that a component is new, hit ENTER to choose the INSTALL default action. **During any time in the install you are prompted that a Reminder term exists, but it is different from the packed component, you should use the MERGE option to not overwrite your current mapped items**.

Example for Reminder Terms:
REMINDER TERM entry named *<Reminder Term Name>* already
exists but the packed component is different, what do you want to do?

   Select one of the following:

       C   Create a new entry by copying to a new name

M   Merge findings
            O   Overwrite the current entry
            U   Update
            Q   Quit the install
            S   Skip, do not install this entry

Enter response: O//**MERGE**

Here are general rules for installing this UPDATE:
   1. If an entry doesn't exist, use the INSTALL Action
   2. If an entry exists, but is different, use the OVERWITE Action except in the case of
      reminder terms

After install of initial reminder components, you will then be promted to install the dialogs. Because there are 4 reminder dialogs in each exchange file, you will be promped <u>4 separate times</u> to install the dialog components.

```
Dialog Components              Oct 28, 2016@11:38:36        Page:   1 of   97
Packed reminder dialog: VA-ONCOLOGY TREATMENT SUMMARY BREAST [NATIONAL DIALOG]


 Item  Seq. Dialog Findings                            Type       Exists
    1     VA-ONCOLOGY TREATMENT SUMMARY BREAST         dialog       X

    2   5 VA-GP ONCOLOGY TREATMENT SUMMARY TITLE       group        X
          Finding: *NONE*

    3  10 VA-GP ONC TREATMENT SUMMARY INSTRUCTIONS     group        X
          Finding: *NONE*
    4  10.5 VA-EL ONC TS INSTRUCTIONS                  element      X
          Finding: *NONE*

    5  20 VA-EL ONCOLOGY PATIENT INFO HSO              element      X
          Finding: *NONE*


    6  30 VA-BLANK LINE IN PN                          element      X
          Finding: *NONE*
+        + Next Screen   - Prev Screen   ?? More Actions
DD   Dialog Details     DT   Dialog Text      IS   Install Selected
DF   Dialog Findings    DU   Dialog Usage     QU   Quit
DS   Dialog Summary     IA   Install All
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** to install the dialog –
Once the install is complete for a particular dialog, you will be returned to the screen above.
There will be an "X" in the Exists column after install. **Next you will enter Q to quit and this
will take you to the next dialog for installation.** Continue to repeat these steps until all 4 of the
dialogs have been installed for the particular exchange file you selected. Once you finish the
install of all the dialogs, you will enter **Q** and you will then be given an opportunity to install any
other components.

```
       Component                                    Category    Exists
Source:       HAMILTON-HILL,SUSAN at SALT LAKE CITY
Date Packed: 10/28/2016@10:38:38
Package Version: 2.0P63

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-ONCOLOGY BREAST CANCER
  VA-ONCOLOGY TREATMENT SUMMARY BREAST
  VA-ONCOLOGY MDC BREAST
  VA-ONCOLOGY TREATMENT PLAN BREAST
Non-exchangeable TIU object(s):
-----------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAME^TIULO(DFN)


+           Enter ?? for more actions                              >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// Q
```

After all components have been installed, you will then be returned to this screen. At the **<u>Select Action</u>** prompt, type **<u>Q.</u>**

Install Completed

Post Installation Set-up Instructions

1. **Configuring two new health summary types**
   There are two TIU objects that are embedded in the VA-Oncology Prostate reminder dialog that need mapping to local labs test. You will need to know your local lab test names in order to correctly map these objects. Detailed instructions for editing the health summary types follow.

   a. HEALTH SUMMARY TYPE: VA-ONC PCA TESTOSTERONE
      1. What are the local lab test name(s) for Testosterone?

   b. HEALTH SUMMARY TYPE:VA-ONC PCA LAST PSA
      1. What are the local lab test name(s) for Prostate-Specific Antigen?

      The following is an example of modifying the health summary type: **VA-ONC PCA TESTORERONE.** The same process should be followed for editing the health summary type: **VA-ONC PCA LAST PSA**.

From Health Summary Maintenance Menu

```
   1      Disable/Enable Health Summary Component
   2      Create/Modify Health Summary Components
   3      Edit Ad Hoc Health Summary Type
   4      Rebuild Ad Hoc Health Summary Type
   5      Resequence a Health Summary Type
   6      Create/Modify Health Summary Type
   7      Edit Health Summary Site Parameters
   8      Health Summary Objects Menu ...
   9      CPRS Reports Tab 'Health Summary Types List' Menu ...
   10     CPRS Health Summary Display/Edit Site Defaults ...

Select Health Summary Maintenance Menu <TEST ACCOUNT> Option: 6
Create/Modify Health Summary Type

Select Health Summary Type: VA-ONC PCA TESTOSTERONE

  VA-Onc PCA Testosterone has (No components)

  OK?  YES//


WARNING:  You are about to edit a Health Summary Type that is being used
by a Health Summary Object.  Changing the structure of this Health Summary
Type will alter how the Object will display.

Do want to continue?  NO// y  YES
NAME: VA-ONC PCA TESTOSTERONE  Replace
TITLE: Testosterone  Replace
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//
SUPPRESS SENSITIVE PRINT DATA: NO SSN
```

```
LOCK:
OWNER:

Do you wish to copy COMPONENTS from an existing Health Summary Type? YES//NO
Select COMPONENT: SLT  LAB TESTS SELECTED SLT
SUMMARY ORDER: 5// 5
OCCURRENCE LIMIT: 10
TIME LIMIT:
HEADER NAME: Lab Tests Selected//

No selection items chosen.

Select new items one at a time in the sequence you want them displayed.
You may select up to 99 items.

Select SELECTION ITEM: Enter exact name of local TESTOSTERONE lab test. You
can enter more than one at the next prompt if needed
```

The VA-ONC PCA TESTOSERONE Health Summary Type Structure should look similar to this:

```
Type Name:  VA-ONC PCA TESTOSTERONE
            Title:  Testosterone
            Owner:
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:  yes
SUPPRESS SENSITIVE PRINT DATA:


                                Max       Hos  ICD  Pro  CPT
Abb   Ord    Component Name     Occ  Time  Loc  Text Nar  Mod  Selection
---------------------------------------------------------------------------
SLT   5      Lab Tests Selected 10                            TESTOSTERONE
```

The VA-ONC PCA LAST PSA Health Summary Type Structure should look similar to this:

```
 Type Name:  VA-ONC PCA LAST PSA
            Title:  PSA
            Owner:
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:  yes
SUPPRESS SENSITIVE PRINT DATA:


                                Max       Hos  ICD  Pro  CPT
Abb   Ord    Component Name     Occ  Time  Loc  Text Nar  Mod  Selection
---------------------------------------------------------------------------
SLT   5      Lab Tests Selected 10                            PROSTATE SPECIFIC ANTIGEN
```

2. **The following dialog elements were created LOCAL so content can be edited, if desired. You are not required to make any changes.**
    **NOTE: there are elements within each dialog group below that can also be edited.

    VAL-EL ONC TP TEAM MEMBERS (edit to add local oncology team member names)
    VAL-GP ONC TP EDUCATION (edit to add local oncology clinic info)
    VAL-GP ONC TS RESOURCES (edit to add any hyperlinks/websites)
    VAL-GP ONC TS FUTURE (edit to add local oncology team members and frequency of return visits)
    VAL-GP ONC TS SURVEILLANCE (edit to add additional cancer surveillance)
    VAL-GP ONC TS IMAGING (edit imaging and follow up tests)
    VAL-GP ONC TS LAB TEST (edit to add additional lab tests)
    VAL-GP ONC MDC BREAST CONSULTS (edit to add local consult/quick order)
    VAL-GP ONC MDC BREAST MEMBERS (edit to add local providers)
    VAL-GP ONC MDC CRC CONSULTS (edit to add local consult/quick order)
    VAL-GP ONC MDC CRC MEMBERS (edit to add local providers)
    VAL-GP ONC MDC GU CONSULTS (edit to add local consult/quick order)
    VAL-GP ONC MDC GU MEMBERS (edit to add local providers)
    VAL-GP ONC MDC THORACIC CONSULTS (edit to add local consult/quick order)
    VAL-GP ONC MDC THORACIC MEMBERS (edit to add local providers)

3. **Replace embedded TIU Objects in the following element <u>only </u>if National objects does not exist or work properly.**

    Dialog: VA-EL ONCOLOGY PATIENT INFO HSO

Embedded TIU Objects:	Description
|PATIENT NAME|	Displays patient name
|PATIENT DATE OF BIRTH|	Displays patient's date of birth
|PATIENT WEIGHT|	Displays patient's weight
|PATIENT HEIGHT|	Displays patient's height

Enable the dialog.
Adding dialog to the TIU Reminder Dialog Parameter (starting from the Reminder Manager Menu).

The following is an example of enabling a dialog so that it can be attached to a Personal or Shared template or note title. You will need to repeat this step for all of the dialogs contained in this update.

Select Reminder Managers Menu <TEST ACCOUNT> Option: CP CPRS Reminder
Configuration
From the Reminders Manager Menu Option:
CA   Add/Edit Reminder Categories
CL   CPRS Lookup Categories
CS   CPRS Cover Sheet Reminder List
MH   Mental Health Dialogs Active
PN   Progress Note Headers
RA   Reminder GUI Resolution Active
TIU   TIU Template Reminder Dialog Parameter
DL   Default Outside Location
PT   Position Reminder Text at Cursor
NP   New Reminder Parameters
GEC GEC Status Check Active
WH   WH Print Now Active

Select CPRS Reminder Configuration <TEST ACCOUNT> Option: TIU   TIU Template
Reminder Dialog Parameter
Reminder Dialogs allows as Templates may be set for the following:

      1 User   USR [choose from NEW PERSON]
      3 Service   SRV [choose from SERVICE/SECTION]
      4 Division   DIV [NAME OF YOUR DIVISION]
      5 System   SYS [YOURSERVER.YOURSITE.MED.VA.GOV]

      Enter selection: 5   System [YOURSERVER.YOURSITE.MED.VA.GOV]
       Setting Reminder Dialogs allows as Templates for System:
      YOURSERVER.YOURSITE.MED.VA.GOV
      Select Display Sequence: ?   ← enter ? to determine last sequence number

      Display Sequence Value

      --------------- -----
      1   DAY COMBINED TOBACCO USER
      2   PATIENT EDUCATION ASSESSMENT
      3   IMMUNIZATION CLINIC DIALOG
      4   RD 580 NEU 562 DYSPHAGIA SCREENING TOOL
      ….412   NON VA CARE COORDINATION NOTE (D)   ← last sequence
number on my list yours will be different Choose a number not on your list

      Select Display Sequence: 413
      Are you adding 413 as a new Display Sequence? Yes//   YES
      Display Sequence: 413//   413
   Clinical Reminder Dialog: VA-ONCOLOGY BREAST   reminder dialog   NATIONAL

...OK? Yes//   (Yes)

The National Oncology reminder dialogs can be used as templates and/or standalone notes. It is a local decision. Collaborate with Hematology/Oncology staff to determine how the dialogs will be used. The National Oncology Program Office will be releasing additional reminder dialogs so it is important to establish an appropriate location, such as shared folder with a separate folder for each type of cancer. Please follow local naming convention guidelines in place at your facility.

4. **Creating a shared folder**
   Open template editor
   Click + sign Shared Templates
   Click on New Template button
   Type Oncology
   Select folder in Template Type box
   Click Apply lower right corner
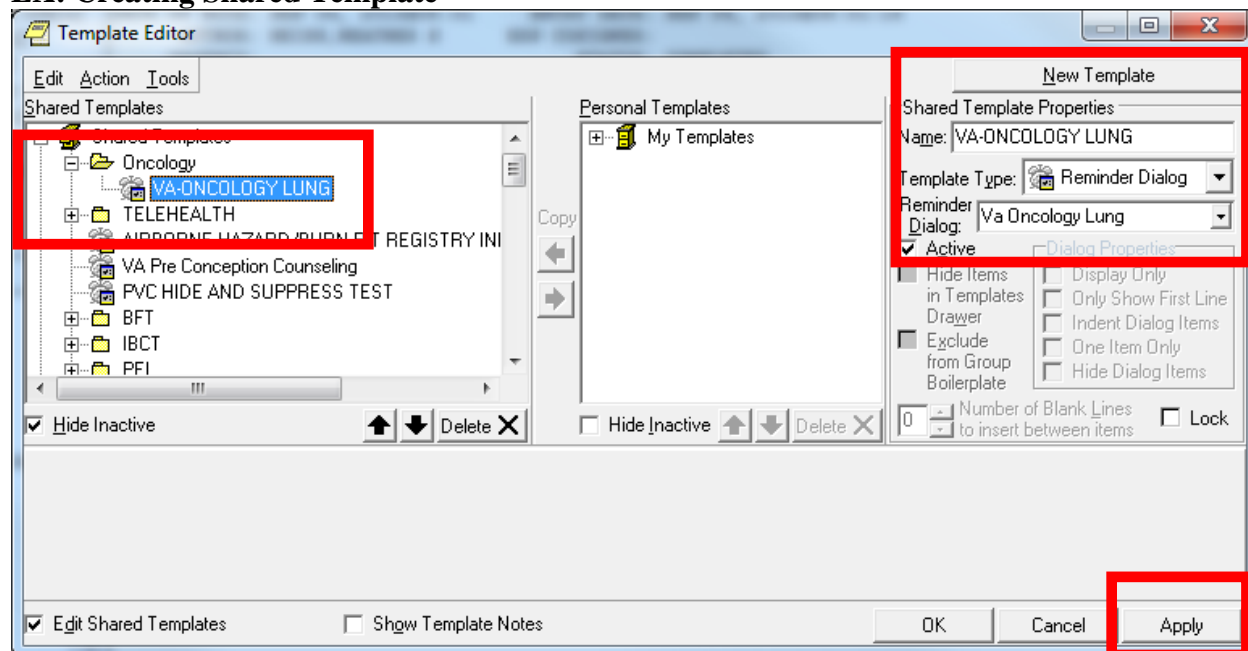
EX: Creating Shared
Folder
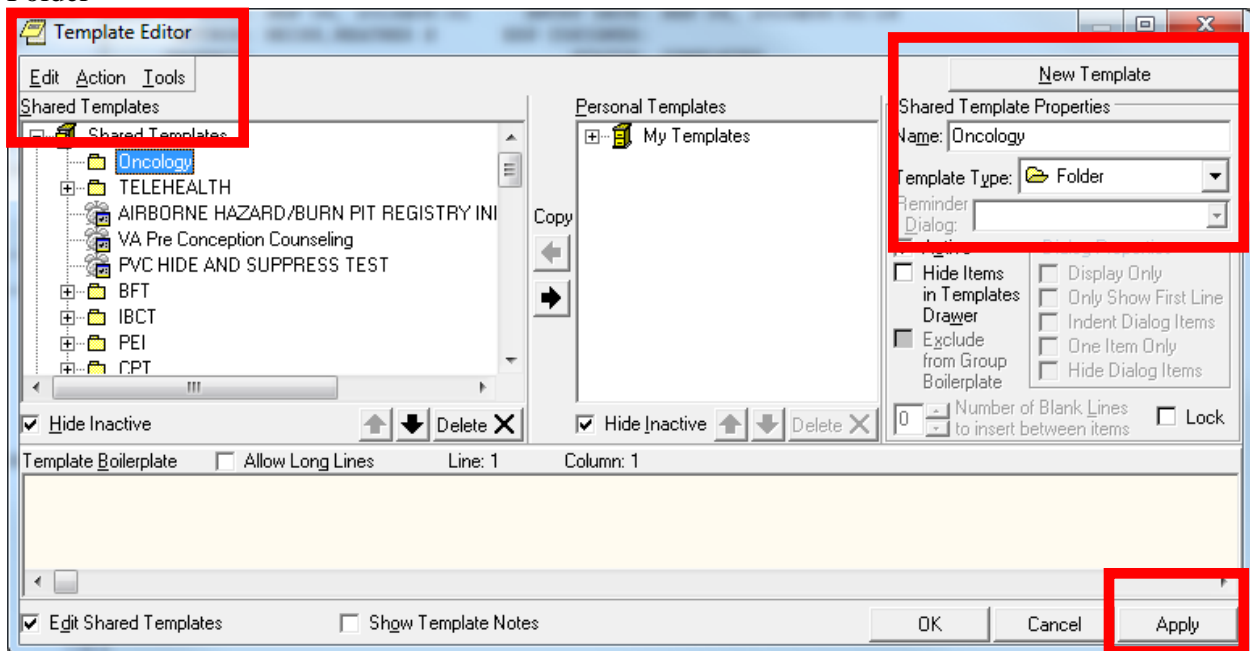
5. **Creating a shared templates**
   Open template editor
   Click + Shared templates
   Locate Oncology folder and click on it
    Click New Template button
   Type VA-ONCOLOGY
   Select Reminder Dialog in template Type box
   Type VA-ONCOLOGY in Reminder Dialog box
   Click Apply lower right corner

EX: Creating Shared Template

6. **Setup of Note titles**

   If your site uses the reminder dialogs as stand-alone notes, you will need to create a new note title for each dialog included in this update.

   All note titles are to be mapped to the following VHA Enterprise Standard Title: **HEMATOLOGY AND ONCOLOGY NOTE.**
   .
   Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide

7. **Linking progress note to reminder dialog**

   The following is an example of attaching a dialog to an associated note so that it can be used as a standalone note. You will need to repeat this step for all of the dialogs contained in this update.

   From Template Editor
   Edit Shared Template
   Click + Document Titles
   Click New Template button
   Type VA-Oncology Lung in Name box
   Click down arrow and Click on Reminder Dialog in Template Type Box
   Type VA-ONCOLOGY in Reminder Dialog box
   Type VA-Oncology Lung Template in Associated Title Box
   Click Apply in lower right corner

EX: Linking progress note to dialog